

Employees may apply for gradual retirement in writing through their immediate supervisor.

HOW TO APPLY

Include the following information (original plus three copies) in the request memorandum:

- 1. Proposed effective date.**
- 2. Present position title, series, grade and step.**
- 3. A statement that the employee has been counseled as to the effect that the requested change will have on his/her pay and benefits.**

RECOMMENDATIONS AND ENDORSEMENTS

If approval is recommended, the recommending official will submit the employee's request and an SF-52, "Request for Personnel Action" to the IC Director, through the IC Personnel Office.

Records/Correspondence

Copies of the Trial Retirement Agreement and associated correspondence (including requests pertaining to gradual retirement) will be maintained as follows:

- 1.** original set to the IC Personnel Office for filing in the employee's Official Personnel Folder;
- 2.** one set to the employee;
- 3.** one set to the recommending official;
- 4.** one set maintained by the IC Personnel Office for at least six months after the obligation to reemploy the individual has expired.

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OHRM/DICC

Building 31, Room 1C-39
wd2u@nih.gov
Phone (301) 402-9484
(301)-496-4491
Fax (301) 480-5171

<http://www1.od.nih.gov/ohrm/retire/nutrial.htm>

NATIONAL INSTITUTES
OF HEALTH
(NIH)

Gradual Retirement Program



WHAT IS GRADUAL RETIREMENT?

Gradual retirement provides opportunity for employees to increase the amount of personal time available to them during approximately the last year before retirement by changing their scheduled tour of duty from:

- **Full-time to part-time** (Current employees who work 80 hours per pay period may reduce their schedule to 64, but not less than 32, hours per pay period).
- **Full-time to WAE/Seasonal** (Current employees who work 80 hours per pay period may change their schedules to intermittent or seasonal employment).
- **Full-time to Baylor** (Employees approved in clinical care positions may work two, twelve-hour tours between midnight Friday and midnight Sunday and receive full-time credit).
- **Part-time change in hours** (Current part-time employees, who work 64 hours per pay period, may reduce their schedule to not less than 32 hours per pay period).
- **Pre-scheduled tour to intermittent** (Current full-time or part-time employees may change to an intermittent status).
- **Extended leave** (Current employees may request approval for blocks of accrued annual leave and/or leave without pay).

DOES GRADUAL RETIREMENT AFFECT PAY AND BENEFITS?

- **Pay** - Both salaried and hourly rate employees are compensated for hours of work actually performed and/or for periods of paid leave. Thus, a reduction in hours will result in payment for fewer hours.
- **Benefits** - Annuity computation is prorated for periods of part-time employment. In addition to the employee's premiums, part-time employees must pay the prorated to full-time portion of the government's share of health benefits premiums. The amount of life insurance and employee premiums will decline with reductions in the annual pay received by the employee. However, reductions will not fall below the \$10,000 minimum for basic life insurance coverage.

Coverage continues for an employee who changes (without a break-in-service) to an appointment which does not entitle him/her to retirement and insurance benefits. When changes do result in assignment to a type of appointment for which CSRS coverage is not continued, employees are reminded to be careful to maintain CSRS service credit of 1 year within the 2-year period immediately preceding separation for retirement. Otherwise, eligibility for an immediate CSRS annuity may be forfeited. Although the employee may be eligible for a deferred annuity, both the creditable service and the annuity will be calculated as of the time that CSRS service credit of 1 year within the past 2-year period was met.

CSRS ELIGIBILITY

An employee covered by the civil service retirement system is eligible to participate if he/she:

- is (or during the next year will attain) age 62 or older with 5 or more years of civilian service; is age 60 or older with 20 or more years of service; or is age 55 or older with 30 years or more of service; and
- is serving under a career appointment; is not a re-employed annuitant or eligible for disability or discontinued service retirement; and has been employed under CSRS for at least 1 year within the 2-year period immediately preceding separation for retirement.

FERS ELIGIBILITY

An employee covered by the federal employees retirement system is eligible to participate if he/she:

- is (or during the next year will attain) age 62 or older with at least 5 years of civilian service; is minimum retirement age (with reduced benefits) with at least 10 years of service; is age 60 with at least 20 years of service; or is minimum retirement age with at least 30 years of service.